Table of Contents

Introduction.............................................................................................................................................. 2
Accessing the STAR Credit Reports........................................................................................................ 3
Report Options .......................................................................................................................................... 7
  • STAR Credit bulk update transaction file ..................................................................................... 7
  • STAR Credit Status Reports ........................................................................................................... 7
  • STAR Credit Check Issued File ........................................................................................................ 7
View the reports ...................................................................................................................................... 8
Download the reports ............................................................................................................................ 9
  • *Note for municipalities whose muni code and SWIS code start with zero.................................... 17
Download the Transaction File for RPS ............................................................................................... 18
Additional STAR Credit Information .................................................................................................... 21
Introduction

The STAR Credit reports are for use by assessors and other authorized users to:

- update assessment roll files to designate STAR credit recipients before tax bill processing so the required language appears on tax bills; and
- verify STAR credit check recipients.

The STAR credit reports are secure data meaning that these reports are available only to the Assessment Community for discharge of their duties as a public employee. Registered users of the secure website agree to restrict their use of this data to assessment purposes and to require that designated staff and vendors under contract to them agree to the same terms prior to sharing data or otherwise receiving access.
Accessing the STAR Credit Reports

1. Go to the Department of Taxation and Finance website: www.tax.ny.gov.
2. Select the Government & Researchers link.
3. Under the online services column, select Assessment Community login.
4. Select the **LOG IN TO ASSESSMENT COMMUNITY** button.

![Online Services for assessors and county directors](image)

**Note:** If you need an account, or to make changes to an existing account, select the **REQUEST ACCOUNT** button for instructions.

5. Select the **STAR Eligibility** bubble.
6. Select STAR Credit Reports.

7. Read the security contract and select Yes, I agree.
8. Select the appropriate Muni code.

9. Select STAR Check Reports.
Report Options

There are three STAR Credit reports. ORPTS will make the appropriate report available in the secure site during the applicable processing time. The assessment community will be notified by email when reports are available.

Reports are selected by municipality. Users will have access only to those municipalities to which they’ve been granted access. Reports are generated by municipal segment. If your municipality is part of more than one school district, your report may be periodically updated to include parcels from school districts that levy taxes later in the processing year. If your municipality is coterminous with the school district, you should only expect this report to be updated once a year.

STAR Credit bulk update transaction file

This report is issued approximately 20 days prior to school tax levy dates.

*RPSv4 users only:* Use this file in tandem with the STAR Management-STAR Credit Update Program, accessible from the *RPSv4 Administration* menu. This download-only file will programatically update your assessment roll by placing markers on parcels eligible for a STAR Credit. It will also remove any existing marker codes currently on the database.

*FoxPro billing software users only:* STAR credit markers will initiate the placement of required language onto school tax bills.

STAR Credit Status Reports

This report is issued approximately 20 days prior to school tax levy dates and identifies parcels eligible for a STAR credit. It can also be used to manually update your roll file with STAR credits recipients *if* you don’t use the STAR Credit bulk update transaction file. Posting the markers will ensure that the required language appears on the proper school tax bills. Keep in mind you must first remove any existing ‘99999’ markers brought forward from last year.

STAR Credit Status Reports reflect the current status of approved registrations. ORPTS continues to process and approve registrations daily. If a registered property owner does not appear on your list, this does not preclude them from consideration for the current year STAR credit check.

STAR Credit Check Issued File

This report is typically issued once a year, after the majority of STAR credits have been processed. The reports are informational in nature, and identify parcels where a STAR credit check has been issued for the current levy year.
View the reports

1. Select View for the desired report*.

*Keep in mind:

- Not all reports are available at all times. For example, in the illustration above, all three STAR Credit reports are showing. Generally, only the report(s) necessary for processing during a particular timeframe will be showing.

- The STAR Credit Bulk Update Transaction file is only available as a download.

- ORPTS will announce report availability via Assessment Community Weekly or direct email.
Download the reports

**NOTE**: the following 15 steps are for the **STAR Credit Status Reports** and **STAR Credit Check Issued file only**. For the **STAR Credit bulk update transaction file**, skip to page 18.

1. Select *Download* for the desired report.

![Image of the STAR Credit Program interface](image)

2. In the pop-up box select *Save as*.
3. Designate where you want to store the file. The file will automatically be zipped. Do not change the *Save as type*. Select *Save*. 
4. Before opening the file, you will need to unzip it. Navigate to where you stored the file by selecting *Open folder* in the pop-up box.

5. Right-click the file and select *Extract All* from the list of options.
6. In the pop-up window, you can change the destination path to a location of your choice, or leave the default path as is. Select Extract. Close the folder. (Note that extracting the file creates a subfolder with the name of the file that’s been unzipped, including the .txt extension. This is the subfolder you will browse to in Excel during steps 8 - 10).
7. Open Microsoft Excel.
8. Browse to the file location and single-click on the file.
9. Select Open.
10. Single-click the file again and select Open (If the file is not showing, ensure that All Files is selected).

11. If you get the following message, select Yes
12. The Text Import Wizard – Step 1 of 3 will open, select My data has headers, then select Next.
13. The *Text Import Wizard – Step 2 of 3* will open, select *Next.*
14. The *Text Import Wizard – Step 3 of 3* will open, select Finish.
   *(For muni & SWIS codes starting with zero (01 – 09), see note on page 17)*

![Text Import Wizard - Step 3 of 3](image)

15. Print or save your report. Remember to keep the report secure as it contains confidential data
*Note for municipalities whose muni code and SWIS code start with zero

During **Step 3 of 3 in the Text Import Wizard**, scroll to the right until the muni_cd and swis_cd columns are viewable, highlight the muni_cd column and select **Text** under the **Column data format** options. Then highlight the swis_cd column and select **Text** under the **Column data format** options. This step directs Excel to retain the leading zero of your muni code and SWIS code for sorting purposes.
Download the Transaction File for RPS

1. Select Download for the STAR Credit bulk update transaction file.

2. In the Internet Explorer pop-up window, select Save as.
3. In the *Save As* pop-up window, select *Save*.

4. RPS does not show zipped files. Therefore, to utilize the file in the *STAR Management Update Program* in V4, you need to unzip it. Navigate to where you stored the file by selecting *Open folder* in the pop-up box.
5. Right-click the file and select *Extract All* from the list of options.

6. In the pop-up window, note the folder where the file will be stored or, browse to your preferred location. Select *Extract*. Close the folder.

7. Proceed to the RPSv4 Administration utility *STAR Management Update Program* to load the report into v4.
Additional STAR Credit Information

For additional information regarding the STAR Credit such as:

- The STAR Credit Implementation Guide
- FAQs for homeowners
- Administration

Visit the [STAR information for local officials](#) webpage on the Tax Department website.